

## CM/ECF Version 2 Upgrade

Beginning Friday, December 17, 2004, our court will begin the process of migrating from Version 1 of CM/ECF to Version 2.3. Beginning at 5:00 pm Friday, December 17, 2004 the CM/ECF system will be unavailable for use. The system is expected to be available by 8:00 am Monday, December 20, 2004.

New versions of software have added features and also improve system processes. This memorandum will layout what the differences are between V1 and V2 and introduce you to some new features of the CM/ECF software. ***Please be assured that, for the most part, you will not see any significant changes to the event menus for both civil and criminal cases. Those will remain as you used them in V1.***

### ■ **REPORTS**

- **Docket Activity Report:** A Docket Activity Report is now available. This report allows attorneys and the public to obtain a list of all filings from a specific time period. Users may run the report for all cases or a specific case number. The attorney has the option to see activity in all case or only cases where he/she is attorney of record. The selection "**Only cases to which I am linked**" is the default.
- **Case Reports:** The Civil and Criminal Cases reports now provide an option to receive output in pipe-delimited format (Data Only) in addition to the HTML format (Formatted Display). The user may save this data to a file.
- **New Nature of Suit Codes:** Five new nature of suit codes available: A new JS 44 - Civil Cover Sheet accompanies this message.

#### **Code Translation**

196	Contract: Franchise
445	Civil Rights: Americans with Disabilities – Employment
446	Civil Rights: Americans with Disabilities – Other
480	Consumer Credit
490	Cable/Satellite TV

### ■ **PACER (Public Access to Court Electronic Records) CHANGES**

- **Fee Increase:** The Judicial Conference of the United States recently increased the fee for public access to case information from seven cents per page to eight cents per page, effective on January 1, 2005. The fee for viewing single case reports and

documents (other than transcripts) larger than 30 pages will be capped at \$2.40 (the new 30-page rate). The fee for viewing multi-case reports (this includes docket reports and all of the options on the Query menu that are available to attorneys and public users) and transcripts will be based on the total number of pages. The text on the PACER Login screen will be modified to reflect the new eight cent rate and the effective date of the change.

- **"Free Look":** Primary and all secondary e-mail recipients for the attorney has added to his/her user account will now receive a "Free Look" at the electronically filed document. This free view is now only available during the first 15 days after the docket entry is made - shortened from 30 days
- **New Programs:**
  - ▶ **Change Client Code, Review Billing History, and Show PACER Account,** have been added to the Utilities menu displayed when users are logged in as an attorney. This eliminates the need for attorneys to refresh the screen if they first log in as a PACER user and then log back in as a filer.
  - ▶ **Remove Default PACER Account** allows attorneys to remove the default association between their current PACER login and their ECF filer login.
  - ▶ **Billing Transaction Receipt:** Descriptions on the PACER Billing Transaction Receipts more clearly define the search performed in a search criteria field based on the function. These receipts are unique for each query or report.

## ■ **VERSION COMPATIBILITY:**

- Public access programs in Version 2.0 are compatible with the upgrade of Netscape and Internet Explorer.

## ■ **CASE/DOCUMENT ACCESS**

- **Criminal Cases:** Pursuant to recent Judicial Conference Policy on Privacy and Public Access to Electronic Criminal Case Files. (*See* [www.privacy.uscourts.gov](http://www.privacy.uscourts.gov)) criminal case documents filed after November 1, 2004 (unless otherwise sealed by statute, policy or other order of the court) are available for viewing over the Internet by PACER users. Documents which were filed prior to November 1, 2004 retain their access level of "court staff and counsel of record with CM/ECF logins and passwords only".
- **Prohibited Access:** Public access to the following documents are prohibited pursuant to the Judicial Conference Policy.

- ▶ unexecuted summonses or warrants of any kind
  - ▶ pretrial bail or presentence investigation reports;
  - ▶ statements of reasons in the judgment of conviction;
  - ▶ juvenile records;
  - ▶ documents containing identifying information about jurors or potential jurors;
  - ▶ financial affidavits filed in seeking representation pursuant to the Criminal Justice Act;
  - ▶ ex parte requests for authorization of investigative, expert or other services pursuant to the Criminal Justice Act; and
  - ▶ sealed documents
- **Redaction Requirements:** Personal data identifiers must be redacted by the filer of a document (civil or criminal case) whether the document is filed electronically or in paper, as follows: (See LR 10.3)
    - ▶ Social Security numbers to the last four digits
    - ▶ Financial account numbers to the last four digits
    - ▶ Names of minor children to the initials
    - ▶ Dates of birth to the year
    - ▶ Home addresses to the City and State.

## ■ LOGIN & PASSWORD REVIEW

- **Electronic Filing:** When entering CM/ECF to electronically file or maintain your user account, use CM/ECF court-generated login & password
- **Reports & Queries:** When entering CM/ECF to run reports or queries or to view documents and docket sheets (including criminal case file documents filed on or after November 1, 2004)
  - ▶ Use PACER login & password
  - ▶ Setting default Pacer Login:
- **Setting Default PACER Login:** CM/ECF users encounter a separate PACER login screen each time a query or report is generated. CM/ECF users may elect to store their PACER login with their CM/ECF login and bypass the additional login prompt in future sessions. The PACER account/password is stored with the CM/ECF account information. All charges will thereafter be billed to that PACER account, and the user will not have to enter the PACER login again.
  - ▶ Login using the CM/ECF login and password.

- ▶ Run a report or query which will cause the PACER login screen to appear.
- ▶ When presented with the PACER Login screen, check the box labeled “Make this my default Pacer login”.

## ■ **VIEWING DOCUMENTS FROM AN E-MAIL MESSAGE**

- **General Document Viewing**
  - ▶ Click on the active hyperlink for the document number or Copy and paste the url for the case number into the browser address window
  - ▶ The PACER login screen appears and the user must enter their PACER login and password
  - ▶ Select the login button
  - ▶ Click on the View Document Button
- **Documents filed in Social Security cases**
  - ▶ Log in to CM/ECF using the CM/ECF Login and password **BEFORE** clicking on the hyperlinks within the e-mail notification.
  - ▶ Return to the e-mail notification window and click on the hyperlinks
  - ▶ The PACER login screen appears and the user must enter their PACER login & password select the login button
  - ▶ Click on the View Document button.
- **Documents filed in Criminal Cases Prior to November 1, 2004**
  - ▶ The user must be logged in to CM/ECF using the CM/ECF Login and password **BEFORE** clicking on the hyperlinks within the e-mail notification.
  - ▶ Return to the e-mail notification window and click on the hyperlinks
  - ▶ The PACER login screen appears where the PACER login & password are entered
  - ▶ Select the login button
  - ▶ Click on the View Document button
- **Documents Filed in Criminal Cases On or After November 1, 2004**
  - ▶ Use PACER login & password

## ■ **VIEWING DOCUMENTS WITHIN CM/ECF**

- **General Document Viewing**

- ▶ Log into the system using the PACER login and password
  - ▶ Enter Client Code - optional
  - ▶ Select the login button
  - ▶ Select Reports or Query on the main blue tool bar
  - ▶ Enter the case number and any other selection criteria
  - ▶ Run the Report
  - ▶ Locate the document and click on the active hyperlink for that document
  - ▶ Click on the View Document Button
- **Documents filed in Social Security cases**
    - ▶ The system must recognize the requestor as an authorized viewer (Counsel of record in the case) before the document will be displayed.
    - ▶ Log into the system using the CM/ECF login and password
    - ▶ Click on Reports or Queries. (Users who have not established a PACER default login, will see the PACER login screen. Enter the PACER login and password and then return to Reports or Queries.)
- **Documents filed Criminal Cases Prior to November 1, 2004**
    - ▶ The system must recognize the requestor as an authorized viewer (Counsel of record in the case) before the document will be displayed.
    - ▶ Log into the system using the CM/ECF login and password
    - ▶ Click on Reports or Queries. (Users who have not established the PACER default login, will see the the PACER login screen. Enter the PACER login and password and then return to Reports or Queries.)
- **Documents Filed in Criminal Cases On or After November 1, 2004**
    - ▶ Use PACER login & password